

Message Text

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ACTION AGR-08

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R 130443Z AUG 76

FM AMEMBASSY CANBERRA

TO SECSTATE WASHDC 8744

LIMITED OFFICIAL USE SECTION 1 OF 3 CANBERRA 5867

STATE PASS AGRICULTURE FOR MEEKER AND ANDERSON, FAS/W.

E.O. 11652: N/A

TAGS: EAGR, ETRD, EGEN, AS

1. GENERAL SITUATION

AUSTRALIA IS NOW MOVING INTO THE 3RD STRAIGHT YEAR OF THE BEEF RECESSION THAT HAS LEFT THE INDUSTRY IN A VERY DEPRESSED SITUATION. A HEAVY OVER-SUPPLY OF MAKET CATTLE, COMPLICATED BY THE DROUGHT, IS EXPECTED TO KEEP PRICES DEPRESSED FOR SOMETIME. THE SEVERE WINTER DROUGHT WHICH HAS PARCHED MUCH OF THE SOUTHERN HALF OF AUSTRALIA CONTINUES IN MOST AREAS WITH LITTLE RELIEF IN SIGHT. EVEN IF GOOD RAINS COME SOON, LITTLE PASTURE GROWTH CAN BE EXPECTED BEFORE OCTOBER AND IN THE WORST DROUGHT AREAS PASTURES MAY NOT RECOVER UNTIL NOVEMBER OR DECEMBER.

THERE WAS A NEAR COMPLETE LACK OF RAIN IN THE SOUTHERN HALF OF AUSTRALIA DURING MAY, JUNE AND JULY. RAINFALL DEFICIENCIES HAVE BEEN THE MOST PRONOUNCED IN THE REGIONS OF PREDOMINATELY LIMITED OFFICIAL USE

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HIGH WINTER RAINFALL. SOME USEFUL RAINS WERE

RECEIVED IN VICTORIA RECENTLY, BUT A SUCCESSION OF FROSTS HAS CHECKED ANY SIGNIFICANT PASTURE GROWTH. THE STOCK SITUATION IN MOST AREAS OF SOUTH AUSTRALIA IS NOW CRITICAL, AND PRODUCERS HAVE STARTED TO SELL OFF WHILE THE STOCK IS STILL IN MARKETABLE CONDITION. YARDINGS HAVE ALSO BEEN HEAVY IN WESTERN AUSTRALIA AND IN THE CENTRAL AND WESTERN PARTS OF NEW SOUTH WALES WHERE THE DROUGHT HAS SEVERELY REDUCED FEED SUPPLIES.

FODDER SUPPLIES ARE LOW AND VERY EXPENSIVE IN THE DROUGHT AREAS WITH HAND FEEDING RESTRICTED TO SELECTED CLASSES OF LIVESTOCK. STOCK HEALTH PROBLEMS ASSOCIATED WITH MALNUTRITION ARE BEGINNING TO SHOW MAINLY IN LOW LAMBING AND CALVING RATES. UNLESS THERE IS A BREAK SOON IN THE DROUGHT, THERE COULD BE A SEVERE SETBACK TO THE LIVESTOCK INDUSTRY IN MANY AREAS OF SOUTHERN AND WESTERN AUSTRALIA.

BY CONTRAST, SEASONAL CONDITIONS HAVE BEEN GENERALLY GOOD IN THE NORTHERN HALF OF AUSTRALIA. PRODUCERS IN THAT AREA HAVE BEEN TURNING OFF GOOD QUALITY STOCK, WHICH IS NOW SELLING AT PREMIUM PRICES ON THE DOMESTIC MARKET. GOOD QUALITY HEAVY BULLOCKS ARE BRINGING ABOUT 25A CENTS A POUND (DRESSED), COMPARED TO 10 A CENTS OR LESS FOR BONING CATTLE.

2. PRODUCTION

CATTLE SLAUGHTER DURING THE FIRST SIX MONTHS OF 1976 WAS UP 17.6 PERCENT; HOWEVER, BEEF PRODUCTION WAS UP ONLY 12.6 PERCENT, REFLECTING LOWER SLAUGHTER WEIGHTS DUE TO THE DROUGHT. SO FAR THIS YEAR THE AVERAGE SLAUGHTER WEIGHT FOR CATTLE HAS BEEN DOWN ABOUT 10 KG ON A YEAR EARLIER. TOTAL BEEF AND VEAL PRODUCTION DURING THE FIRST 6 MONTHS TOTALLED 924,291 MT COMPARED TO 813,351 MT LIMITED OFFICIAL USE

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LAST YEAR.

WE ARE NOW ESTIMATING TOTAL BEEF AND VEAL PRODUCTION FOR 1976 AT 1.85 MILLION MT, UP SLIGHTLY FROM OUR LAST ESTIMATE, AND 11 PERCENT ABOVE LAST YEAR'S RECORD LEVEL. THE NUMBER OF CATTLE SLAUGHTERED WILL BE UP ABOUT 16 PERCENT. THE MEAT WORKS ARE TAKING ABOUT ALL

THE CATTLE THEY CAN HANDLE AND THERE IS LITTLE INCENTIVE TO INCREASE OUTPUT AS THE FLOW OF EXPORTS HAS SLOWED IN RECENT WEEKS AND THE DOMESTIC MARKET REMAINS OVER-SUPPLIED WITH LOWER QUALITY BEEF. SOME MEAT WORKS ARE CONCERNED ABOUT LABOR PROBLEMS IF PRODUCTION IS PUSHED TOO HIGH.

3. EXPORTS

DOMESTIC BEEF CONSUMPTION IN 1976 IS ESTIMATED AT 950,000 MT (CWE), OR A LITTLE OVER HALF THE TOTAL SUPPLY. TOTAL EXPORTS ARE NOW ESTIMATED AT 870,000 MT (CWE), OR 580,000 MT PRODUCT WEIGHT. SOMEWHAT HIGHER THAN NORMAL STOCKS ARE FORECAST FOR THE END OF THIS YEAR. STOCKS CURRENTLY IN COLD STORES HAVE NOW REACHED A RECORD LEVEL OF ABOUT 126,000 MT. THE MAIN REASONS FOR THE BUILD-UP HAVE BEEN THE INTRODUCTION OF MINIMUM EXPORT PRICES TO CANADA AND SWEDEN, SLOWING OF EXPORTS TO THE U.S., AND INDUSTRIAL DISPUTES BY THE WATERFRONT UNIONS. MEAT EXPORTS TO CANADA AND SWEDEN HAVE PRACTICALLY CEASED SINCE MINIMUM EXPORT PRICES WERE INTRODUCED.

OUR LATEST ASSESSMENT IS THAT AUSTRALIAN MEAT SHIPMENTS TO THE U.S. (SUBJECT TO THE MEAT IMPORT LAW) COULD STILL REACH 340,000 MT IN 1976 IN THE ABSENCE OF ANY RESTRAINTS ON SHIPMENTS DURING THE BALANCE OF THE YEAR. THE BOARD HAS ADDED MORE SHIPPING SPACE (CONVENTIONAL) TO PROVIDE ADDITIONAL SERVICE TO THE U.S. THE ABOVE SHIPPING ESTIMATE COULD BE DIFFICULT LIMITED OFFICIAL USE

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TO MEET IF THE SERIOUS DELAYS AND LABOR PROBLEMS ON THE WHARFS ARE NOT SETTLED SOON. ACTUAL EXPORTS TO THE U.S. UNDER THE V.R. AGREEMENT WILL LIKELY BE ABOUT 290,000 MT (LESS CARRY-IN FROM 1975). AN ADDITIONAL 10,000 MT IS EXPECTED TO REACH THE U.S. VIA THE FREE-PORT ZONE IN PUERTO RICO.

THE DIVERSIFICATION SCHEME REMAINS UNCHANGED FROM THAT PREVIOUSLY REPORTED. BASED ON DOCUMENTS ALREADY RECEIVED AND APPROVED BY THE BOARD, A TOTAL OF ABOUT 220,000 MT WILL HAVE BEEN SHIPPED DURING THE FIRST 3 QUARTERS OF THIS SHIPPING YEAR LEAVING SOME 70,000 MT OPEN FOR THE FINAL QUARTER. THE BOARD WILL RE-

LEASE SUFFICIENT CREDITS TO FILL THE REMAINING
QUOTA LEVEL ONCE THE QUESTION OF CARRY-IN
FROM 1975 SHIPMENTS HAS BEEN SETTLED.
AUSTRALIAN MEAT BOARD OFFICIALS ARE PROCEEDING
ON THE BASIS THAT SHIPMENTS THROUGH THE FREE-
PORT ZONE IN PUERTO RICO WILL NOT COUNT AGAINST

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R 130443Z AUG 76
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TO SECSTATE WASHDC 8745

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AUSTRALIA'S QUOTA, AT LEAST UNTIL THE REGULATIONS
ARE CHANGED. EXPORTERS ARE REPORTED TO BE
SHORT OF DIVERSIFICATION CREDITS FOR THE U.S.
MARKET DUE TO THE BOARD'S DECISION TO HOLD SHIP-
MENT WITHIN THE RESTRAINT LEVEL BY QUARTERS.
UNFROZEN CREDITS CURRENTLY HAVE A MARKET
VALUE OF ABOUT 20 TO 25 A CENTS LB, BUT FEW
ARE EXCHANGING HANDS AT THOSE PRICES.

SHIPMENTS TO JAPAN HAVE BEEN LESS THAN
ANTICIPATED EARLIER THIS YEAR. SHIPMENTS DURING
THE FIRST HALF OF 1976 TOTALLED 32,243 MT.
THE MEAT BOARD WAS FORCED TO ABANDON ITS PROPOSAL
TO PUT MINIMUM EXPORT PRICES ON MEAT SHIPPED
TO JAPAN AFTER THE JAPANESE GOVERNMENT THREATENED
TO COUNTER BY IMPOSING MAXIMUM PRICES ON
IMPORTS. FACED WITH THE POSSIBILITY OF LOWER

MAXIMUM PRICES THAN THE BOARD'S MINIMUM PRICES,
THE SCHEME WAS WITHDRAWN. TOTAL BEEF SHIPMENTS
TO JAPAN FOR 1976 ARE NOW ESTIMATED AT
70,000 MT.

THE 12,000 MT SALE OF BONELESS BEEF TO
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THE USSR WAS WELCOMED BY THE INDUSTRY; HOWEVER,
THERE HAS BEEN A GREAT DEAL OF DISSATISFACTION
WITH THE PRICE. THE FAS PRICE TO EXPORTERS
HAS BEEN SET AT 24.25 A CENTS PER POUND.
THIS ROUGHLY CONVERTS BACK TO A LOW
PRODUCER PRICE OF ABOUT 5 TO 8 A CENTS A
POUND (DRESSED). THIS IS LESS THAN CURRENT QUOTES
FOR COWS ON MOST MARKETS. THE GOVERNMENT HAS
NOTIFIED THAT BOARD THAT IT WOULD NOT BE
PREPARED TO SUBSIDIZE THIS SALE. IT REMAINS TO
BE SEEN IF THE BOARD CAN GET THE BEEF TO FILL
THIS CONTRACT AT THE FAS PRICE IT QUOTED TO
EXPORTERS.

SALES TO THE MIDDLE EAST APPEAR BRIGHTER
WITH THE SIGNING OF AN 8,000 MT CONTRACT WITH
THE GOVERNMENT OF EGYPT. IRAN IS REPORTED TO
BE IN THE MARKET FOR SOME LARGE ORDERS OF BEEF.
TOTAL SALES ARE ESTIMATED AT 20 TO 25,000 MT
FOR 1976

SALES TO CANADA WERE RUNNING HEAVY BEFORE
THE IMPOSITION OF MINIMUM EXPORT PRICES. NO
NEW CONTRACTS HAVE BEEN WRITTEN SINCE JUNE 11
WHEN THE MINIMUM EXPORT PRICE SCHEME BECAME
EFFECTIVE. ALL OUTSTANDING CONTRACTS WRITTEN
AFTER THAT DATE HAD TO BE RENEGOTIATED TO
REFLECT THE NEW MINIMUM EXPORT PRICE. THE
CUT-OFF DATE FOR SHIPMENT OF CONTRACTS WRITTEN
BEFORE JUNE 11, WAS JULY 16. TOTAL
SHIPMENTS FOR THE YEAR ARE NOW ESTIMATED AT
39,000 MT, WHICH IS HIGHER THAN EARLIER
ESTIMATED.

PROSPECTS FOR SALES TO EUROPE AND OTHER
MINOR MARKETS MAY HAVE IMPROVED SOMEWHAT FOLLOWING
OVERSEAS TRIPS BY MINISTER FOR OVERSEAS TRADE,
THE MINISTER FOR PRIMARY INDUSTRIES AND THE
CHAIRMAN OF THE MEAT BOARD. ESTIMATES OF
POTENTIAL SALES TO THE EEC VARY, BUT WITH
HIGH SLAUGHTERINGS THERE DUE TO THE DOUGHT,
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SALE PROSPECTS ARE PROBABLY NOT GOOD UNTIL NEXT YEAR. A POSSIBILITY OF A 12,000 MT SALE TO ROMANIA IS BEING INVESTIGATED. GREECE TOOK 11,000 MT BEFORE CUTTING OFF ALL IMPORTS ON JULY 31. ISRAEL JUST CONCLUDED A TRIAL CONTRACT FOR 2,000 MT. OFFICIALS ARE HOPEFUL THAT THIS COULD LEAD TO ORDERS AMOUNTING TO 10 TO 15,000 MT OF KOSHER KILLED AUSTRALIAN BEEF EACH YEAR. OTHER MINOR MARKETS WHERE SUBSTANTIAL SALES ARE EXPECTED INCLUDE THE PHILIPPINES, HONG KONG, TAIWAN AND MALAYSIA-SINGAPORE.

4. GOVERNMENT PROGRAMS

THE GOVERNMENT HAS BEEN UNDER CONSIDERABLE PRESSURE FROM PRODUCER GROUPS FOR MORE HELP TO ASSIST THEM THROUGH THE CURRENT CRISIS. LIVESTOCK PRODUCERS CLAIM THEY ARE NOW AT THE MERCY OF BOTH THE MARKET AND THE WEATHER. A SUMMARY OF GOVERNMENT PROGRAMS WHICH HAVE BEEN INITIATED TO ASSIST THE INDUSTRY INCLUDE:

- (1) DROPPING THE MEAT EXPORT CHARGE,
- (2) COMPENSATION FOR SLAUGHTER OF T.B. AND BRUCELLOSIS REACTORS, (3) RE-INTRODUCTION OF SUPERPHOSPHATE BOUNTY, (4) \$A1.24 MILLION SUBSIDY FOR THE SALE OF MEAT TO USSR LAST YEAR, (5) LOW INTEREST CARRY-ON FINANCING AND (6) FEDERAL GRANTS TO VICTORIA AND WESTERN AUSTRALIA TO SUBSIDIZE COST OF TRANSPORTING FODDER INTO AND LIVESTOCK OUT OF THE DROUGHT AREAS.

THE STATE OF VICTORIA DECIDED TO RAISE THE CATTLE SLAUGHTER PAYMENT (DESTRUCTION FEE) FROM \$A5 TO \$A10 PER HEAD. 26,000 CATTLE HAVE ALREADY BEEN DESTROYED. THE SCHEME WILL CONTINUE UNTIL THE END OF AUGUST. GRAZIERS FEEL MORE AID IS NEEDED AND HAVE REQUESTED THAT THE FEDERAL GOVERNMENT SUSPEND THE NEW \$A1 PER HEAD SLAUGHTER LEVY, PUT A FREEZE ON WAGES, DEVALUE THE DOLLAR AND REDUCE TARIFFS WHERE SUCH ACTION WOULD LOWER THE COST OF

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FARM INPUTS.

THE GOVERNMENT IS MOVING AHEAD WITH ITS
PLANS TO REORGANIZE THE MEAT BOARD. INSTEAD
OF HOLDING A SPECIAL INQUIRY INTO THE
POWERS AND FUNCTIONS OF THE BOARD, THE
MINISTER FOR PRIMARY INDUSTRY HAS ANNOUNCED
THAT HE WILL SOON DISTRIBUTE A DRAFT
PROPOSAL OF RECOMMENDED CHANGES TO ALL SECTIONS
OF THE INDUSTRY BEFORE THE GOVERNMENT
INTRODUCES ANY NEW LEGISLATION. THE NAME
OF THE AUSTRALIAN MEAT BOARD WILL LIKELY BE
CHANGED TO THE AUSTRALIAN MEAT AND LIVESTOCK
CORPORATION. SINCLAIR PROPOSES A BOARD OF 9
PEOPLE CONSISTING OF A FULLTIME CHAIRMAN,
4 MEMBERS REPRESENTING THE LIVESTOCK SECTOR, 3
MEMBERS WITH SPECIAL QUALIFICATIONS AND
ONE GOVERNMENT REPRESENTATIVE. SOME SECTIONS
OF THE PRESENT MEAT ACT ARE EXPECTED TO BE
CHANGED IN ORDER TO GIVE THE NEW CORPORATION
MORE TRADING POWERS. THERE HAS ALREADY
BEEN A STORM OF PROTEST FROM EXPORTERS WHO
FEEL THEY SHOULD HAVE STRONGER REPRESENTATION

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R 130443Z AUG 76

FM AMEMBASSY CANBERRA

TO SECSTATE WASHDC 8746

LIMITED OFFICIAL USE SECTION 3 OF 3 CANBERRA 5867

UNDER ANY NEW REORGANIZATION PLAN.

5. MUTTON

MUTTON PRODUCTION WILL BE SUBSTANTIALLY HIGHER THAN EXPECTED DUE TO THE DROUGHT. MANY SHEEP PRODUCERS HAD HOPED TO BUILD-UP THEIR FLOCKS FOLLOWING THE BOOST IN THE FLOOR PRICE FOR WOOL, BUT ADVERSE SEASONAL CONDITIONS AND SHORT FEED SUPPLIES HAS PREVENTED THIS EXPECTATION.

EXPORTERS ARE ELATED ABOUT THE GOOD EXPORT MARKET FOR MUTTON. THE CURRENT FAS PRICE FOR BONELESS MUTTON IS ABOUT 85 A CENTS KG COMPARED TO 67 A CENTS A YEAR AGO. THE TOP EXPORT MARKET HAS BEEN JAPAN FOLLOWED BY THE MIDDLE EAST. SALES TO JAPAN ARE EXPECTED TO REACH 90,000 MT AND THE MIDDLE EAST 25,000 MT IN 1976. MUTTON SALES TO THE U.S. ARE EXPECTED TO BE ONLY ABOUT 275 MT THIS YEAR.

PART A - BEEF AND VEAL:

I. SUMMARY

1. NUMBERS ON FARMS (1,000 HEAD):

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	1975	1976	1977
	(ACTUAL	(ESTIMATE)	(FORECAST)
MARCH 31	32,793	33,412	34,000

2. SLAUGHTER (1,000 HEAD):

CATTLE	7,565	8,770	8,700
CALVES	1,733	1,700	1,650
TOTAL	9,298	10,470	10,350

3. PRODUCTION (1,000 MT, CWE):

BEEF	1,608	1,780	1,732
VEAL	62	70	68
TOTAL	1,670	1,850	1,800

II. SUPPLY AND DISTRIBUTION FOR BEEF AND VEAL IN 1,000 MT,

CWE:

SUPPLY:

STOCKS	73	70	100
PRODUCTION	1,670	1,850	1,800
TOTAL	1,743	1,920	1,900

DISTRIBUTION:

DOM. CONSUMPTION	927	950	900
EXPORTS	746	870	925
(PROD. WT.)	(514)	(580)	(610)
ENDING STOCKS	70	100	75
TOTAL	1,743	1,920	1,900

III. BEEF AND VEAL SHIPMENTS TO U.S. FOR NOV-OCT SHIPPING
YEAR UNDER ASSUMPTION OF RESTRAINTS AND NO RESTRAINTS FOR
1976 WITH COMPARISONS OF ACTUAL SHIPMENTS FOR 1975 (MT,
AND PRODUCTION WEIGHT):

	1975	1976 1)	
	(ACTUAL	(WITH	(WITHOUT
	RESTRAINTS)	RESTRAINTS)	RESTRAINTS)
1ST QUARTER	98,616	67,909	67,909
2ND QUARTER	61,224	78,372	78,372
3RD QUARTER	87,401	73,150	73,150
4TH QUARTER	73,031	70,569	120,569
TOTAL	320,272	290,000	340,000

1) DOES NOT INCLUDE CARRY-IN FROM 1975, OR SHIPMENTS
OUTSIDE QUOTA THROUGH PUERTO RICO.
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IV. BEEF AND VEAL EXPORTS BY COUNTRY OF DESTINATION FOR
CALENDAR YEAR 1975 WITH ESTIMATES FOR 1976 (MT, PRODUCT
WEIGHT):

	1975	1976
	(ACTUAL)	(FORECAST)
U.S.	295,564	300,000 1)
CANADA	26,759	39,000
U.K. AND E.C.	21,412	20,000
OTHER EUROPE	12,349	30,000
JAPAN	35,602	70,000
USSR	35,147	12,000
MIDDLE EAST	20,845	25,000
MAL-SING	6,806	9,000
OTHER	59,087	75,000
	513,571	580,000

1) ALLOWS FOR 10,000 MT THROUGH THE FREE-TRADE ZONE
IN PUERTO RICO.

PART B - SHEEP AND MUTTON

I. SUMMARY

1. NUMBERS ON FARMS (1,000 HEAD):

	1975	1976	1977
	(ACTUAL	(ESTIMATE)	(FORECAST)
MARCH 31	151,652	149,140	150,000

2. SLAUGHTER (1,000 HEAD):

SHEEP	14,730	17,000	16,000
LAMBS	15,531	15,650	16,500

3. SHEEPMEAT PRODUCTION (MT)

MUTTON	292,327	340,000	320,000
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LAMB 255,345 260,000 265,000

II. SUPPLY AND DISTRIBUTION FOR MUTTON IN 1,000 MT, CWE:

SUPPLY:

STOCKS	15	20	35
PRODUCTION	292	340	320
TOTAL	307	360	355

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DISTRIBUTION:

DOM. CONSUMPTION	109	100	100
EXPORTS	178	225	230
(PROD. WT.)	(113)	(145)	(140)
ENDING STOCKS	20	35	25
TOTAL	307	360	355

III. (1) FORECAST OF MUTTON SHIPMENTS TO U.S. IN 1976

IN NOV-OCT SHIPPING YEAR WITH COMPARISONS FOR 1975 (MT,
PRODUCT WEIGHT):

	1975 (ACTUAL)	1976 (FORECAST)
1ST QUARTER	26	--
2ND QUARTER	42	116
3RD QUARTER	173	30
4TH QUARTER	31	129
TOTAL	272	275

2. MUTTON EXPORTS IN 1975 AND FORECAST FOR 1976 (MT, PRODUCT WEIGHT):

JAPAN	68,732	90,000
MIDDLE EAST	18,559	25,000
CANADA	8,553	8,000
U.K.	4,429	12,000
MAL-SING	4,040	4,000
U.S.	259	275
OTHERS	8,820	5,725
TOTAL	113,392	145,000

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Message Attributes

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